



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

			GENERAL HEARING 9/28/15	NEEDS/PROBLEMS/COMMENTS:
			ANGELINA DOUGLAS and MAX DOUGLAS are Petitioners. Angelina Douglas is the minor's maternal first cousin.	Note: This petition is for guardianship of the person only. The Fresno County Public Guardian was appointed Successor Guardian of the Estate of this minor on 1/13/10.
	Aff.Sub.Wit.		Father: RUDY ESTRADA (Deceased) Mother: LUCY AMARO (Deceased)	1. Petitioners and the minor reside in Las Vegas, NV. Need clarification and authority re jurisdiction for establishing a guardianship of the person in California.
✓	Verified		Paternal Grandfather: Jesse Estrada Paternal Grandmother: Esther Estrada	Note: Guardianship of the <u>estate only</u> was established in 2008 by Jesus' father, Rudolph Estrada. Mr. Estrada was removed as guardian of the estate and the Public Guardian was appointed as successor guardian of the estate on 1/13/10. The existence of this guardianship estate case in Fresno does not necessarily impart jurisdiction for guardianship of the person to be established here. If the Petitioners and minor intend to continue to reside in Nevada, as is implied by the statement that he needs to be enrolled in school there, then guardianship of the person must be established in that state. See Probate Code §§ 2202, 2352.
	Inventory		Maternal Grandfather: Tony Amaro (Deceased) Maternal Grandmother: Rafaela Amaro (Deceased)	2. Need proof of <u>personal</u> service of Notice of Hearing with a copy of the petition at least five court days prior to the hearing per Probate Code §2250(e) on the minor Jesus Estrada.
	PTC		Siblings: Evangelina Sandoval, Elizabeth Torres, Acencion Estrada, Rudy Estrada, Jr., and Antonio Estrada	SEE ADDITIONAL PAGES
	Not.Cred.		Petitioners state all person with legal custody are deceased. Jesus has five siblings over age 18, three living in Stockton, one incarcerated, and one in Fresno at an unknown address. The guardianship was commenced in 2008. The Public Guardian was appointed as guardian of the estate of this minor. As both parents have died, it is necessary to have a guardian of the person. Jesus needs to enroll in school in Las Vegas. He also needs to be added to Petitioners' health coverage.	
✓	Notice of Hrg			
✓	Aff.Mail	w		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	x		
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 8/5/15
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 1 – Estrada

Page 2

NEEDS/PROBLEMS/COMMENTS (Cont'd):

- 3. Petitioner mailed notice to County Counsel only. The Public Guardian, Successor Guardian of the Estate, was not directly served. Direct notice to the Public Guardian's office is required per Probate Code §1214, CRC 7.51.**
- 4. Petitioners state the minor's adult sibling Antonio Estrada's current address is unknown, although the UCCJEA indicates that the minor resided with the father and Antonio at an address in Fresno until June 2015. The Court may require diligence re notice to Antonio or notice mailed to Antonio's last known address for possible forwarding for this temporary hearing or for the general hearing.**
- 5. Need temp letters.**

First and Final Account and Report of Executor and Petition for Its Settlement, for Allowance of Compensation to Executor and Attorneys for Ordinary Services and for Final Distribution

DOD: 7/4/12		<p>WILLIAM MARTIN (MARTY) SHIBA, Executor with Full IAEA without bond, is Petitioner.</p> <p>Account period: 7/4/12 through 5/15/15 Accounting: \$74,985.35 Beginning POH: \$70,121.84 Ending POH: \$10,189.30</p> <p>Executor (Statutory): \$2,859.41</p> <p>Attorney (Statutory): \$2,859.41 (Payable \$750.00 to Dean Hiyama and \$2,109.41 to Executor's former attorney, G. L. Motsenbocker)</p> <p>After payment of fees, costs, reimbursement of costs and expenses, there will be one creditor's claim from the Dept. of Healthcare Services with a balance remaining of \$495,569.42. Petitioner requests to pay the remaining \$2,970.48 to DHS with the first \$492,548.94 of any thereafter discovered property until the claim is satisfied in full.</p> <p>After said claim is satisfied, any other property of the estate not now known or discovered should be distributed to the four heirs in ¼ shares each pursuant to Decedent's will.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Disbursements schedule includes payments related to real property (mortgage, util, maintenance); however, no real property was inventoried in this estate. Need clarification.</p> <p>2. Petitioner did not file the mandatory Allowance or Rejection of Creditor's Claim for either of the claims filed. It appears both have been allowed, as the disbursements schedule reflects payment in full of the \$1,727.49 to Kristine Shiba and the petition requests payment to DHS until paid in full. However, the Court may require the mandatory forms to be filed (reflecting notice of allowance to the creditors), and/or may require receipt for the claim paid from Ms. Shiba.</p> <p>3. Need order. Local Rule 7.1.1.F.</p>	
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			3/29/13
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
	Order			X
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			
<p>Reviewed by: skc</p> <p>Reviewed on: 8/6/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2 – Shiba</p>				

First and Final Account and Report of Personal Representative, Petition for Settlement, for Allowance of Commission and for Ordinary and Extraordinary Attorneys' Fees, Reimbursement of Costs, and for Final Distribution

DOD: 8/21/12	GILDA WALKER , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Attorney costs includes \$42.24 to First Legal for costs advanced. It is unclear what this charge is for. Local Rule 7.17B states runners services are not reimbursable costs.
	Account period: 8/21/12 – 6/17/15	
	Accounting - \$191,740.80	
Cont. from	Beginning POH - \$191,635.13	
Aff.Sub.Wit.	Ending POH - \$144,251.94	
<input checked="" type="checkbox"/> Verified	Administrator - \$6,175.17 (statutory)	
<input checked="" type="checkbox"/> Inventory	Administrator costs - \$5,050.67 (for maintenance and utilities on the real property until it was sold)	
<input checked="" type="checkbox"/> PTC	Attorney - \$6,175.17 (statutory)	
<input checked="" type="checkbox"/> Not.Cred.	Attorney X/O - \$2,737.50 (for sale of real and personal property, 6.75 attorney hours @ \$250/hr. and 10.5 paralegal hours @ \$100/hr.)	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney costs - \$2,848.39 (filing fees, publication, certified copies, inventory, publication)	
<input checked="" type="checkbox"/> Aff.Mail W/	Distribution, pursuant to intestate succession, is to:	
Aff.Pub.	Gilda Walker - \$30,316.26	
Sp.Ntc.	Kathleen Wamsley - \$30,316.26	
Pers.Serv.	Carolyn S. Ruelas - \$30,316.26	
Conf. Screen	Jeanie Carter Ruiz - \$15,158.13	
<input checked="" type="checkbox"/> Letters 8/30/13	Joseph D. Galvan - \$15,158.13	
Duties/Supp		
Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		

Reviewed by: KT
Reviewed on: 8/6/15
Updates:
Recommendation:
File 3 – Miles

**Petition Statement of Public Administrator's Disposition of Property; and
Request for Discharge.**

DOD: 3/20/13	PUBLIC ADMINISTRATOR , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing along with a copy of the Petition on: a. Department of Health Care Services.
	Account period: 3/20/13 – 6/11/15	
Cont. from	Accounting - \$112,954.82	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$110,000.00	
<input checked="" type="checkbox"/> Verified	Ending POH - \$0	
<input type="checkbox"/> Inventory	Administrator - \$4,046.06	
<input type="checkbox"/> PTC	(less than statutory)	
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	Attorney - \$4,046.06	
<input type="checkbox"/> Aff.Mail	(less than statutory)	
<input type="checkbox"/> Aff.Pub.	Bond fee - \$421.26	
<input type="checkbox"/> Sp.Ntc.	(o.k.)	
<input type="checkbox"/> Pers.Serv.	Petitioner states a creditor's claim was filed in the sum of \$193,977.67 by the Department of Health Services. The residue of the estate was paid to the Department of Health Services.	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	Petitioner requests that this estate be settled and closed until such time as further assets may be discovered and return of these proceedings may be necessary. It is further requested that the Public Administrator be discharged in this matter.	
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting	The Department of Health Care Services filed a Request for Special Notice, which was not withdrawn, so this matter was set for hearing.	
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 8/6/15
		Updates:
		Recommendation:
		File 4 – Burton

Status Hearing

Age: 7	<p>CECILIA RODRIGUEZ, mother was appointed Guardian of the Estate on 10/29/13 with all proceeds (\$40,000.00) to be deposited into a blocked account.</p> <p>On 10/15/13, Guardian filed a Petition for Authority to Expend Money for Support and/or Maintenance and/or Education of Minor.</p> <p>On 04/15/14, the Court granted Guardian's Petition for Authority to Expend Money, etc. allowing Guardian to withdraw \$1,000.00 per month from the blocked account beginning 04/15/14 and continuing for 12 months without further court order. Minute Order from 04/15/14 set this hearing for a status hearing on 07/15/15.</p> <p>Declaration of Cecilia Rodriguez filed 7/2/15 states since the 4/29/14 order was signed, 12 months have passed wherein she was authorized to withdraw \$1,000.00 each month, plus \$870.00 for legal expenses, from the blocked trust account. On 4/15/15, the Court did not grant her Petition for Authority to Expend Money for Support and/or Maintenance and/or Education of Minor, and the matter was continued to 7/15/15 seeking further proof why \$1,000/month is necessary for the support, maintenance and education of the minor.</p> <p>The following expense are incurred monthly for the comfortable and suitable support and/or maintenance and/or education of the minor:</p> <ul style="list-style-type: none"> • Rent: \$574.00 • Food and household supplies: \$376.00 • Utilities and telephone: \$140.00 • Clothing: \$25.00 • Child care: \$600.00 (1/2 for Chrystina) • Transportation: \$620.00 (gas, insurance, and car payment) 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 07/22/15 Minute Order from 07/22/15 states: The Court will allow Ms. Rodriguez to withdraw \$1,000.00 for the month of August. If she is allowed to withdraw more in the future, it will go for 60 to 90 days at a time and she will have to file proof of her progress in school. Counsel will submit an order to withdraw the funds, and is also to submit a declaration with verification of the current account balance.</p>
Cont. from 041515, 071515, 072215		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice	<p>Reviewed by: JF</p> <p>Reviewed on: 08/06/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6 – Rodriguez</p>	

SEE PAGE 2

Declaration of Cecilia Rodriguez filed 7/2/15 (Cont'd):

Ms. Rodriguez states prior to her husband's death, he was the main provider for the family and always worked. Ms. Rodriguez worked seasonally in field work only and otherwise cared for Christopher. She was pregnant with Chrystina at the time of her husband's death.

She is currently renting an apartment and resides there with Christopher and Chrystina, both of the children from her marriage with her deceased husband. This is in the best interests of Christopher and Chrystina.

This year, she worked a total of 48 hours a week for one month at Sunstall, a solar company. She obtained this position through a temp staffing agency. On Monday 4/27/15, she will start a job at a winery in quality control, where she will earn \$11/hour. She will be employed approx. 3 months, but is hopeful it will transpire into something long term to support herself and her children.

When working, the children are at a daycare, which takes and picks up Christopher from school and watches him before and after school. Chrystina stays there all day. The daycare charges \$30/day for both children.

Ms. Rodriguez states she currently receives transitional food stamps to help feed the children, which will end in August 2015. She is borrowing a vehicle from her cousin to provide transportation to school, doctor, grocery store for the benefit of the children. She pays gas, insurance, car payment. The most recent bank account statement shows cash on hand as of 12/31/14 of \$30,132.54.

Ms. Rodriguez respectfully prays for an order for authorization as guardian of the estate of Christopher Rodriguez to withdraw \$1,000/month without further court order to be expended for the comfortable and suitable support and/or maintenance and/or education of Christopher Rodriguez, including but not limited to rent, food, household supplies, utilities and phone, clothing and transportation, until further order of this court, or as the court may deem proper.

Supplemental Declaration of Cecilia Rodriguez filed 07/21/15 lists the college classes she has taken and states that she is currently pursuing a Certificate of Achievement in Office Technology-Medical Administrative Assistant at Reedley College. She has already completed 2 classes and plans to complete the required courses in Spring 2016. The cost is \$46/unit per semester, plus insurance fees of \$19/semester, plus books. She has completed the FAFSA (Fee Application for Federal Student Aid) and she may be eligible for student aid. She states that the \$1,000/month is needed for the next 12 months to allow her to meet the financial obligations of raising two children on her own while she attends school.

Declaration of Victoria R. Bernhardt Regarding Petition for Distribution filed 07/23/15 states: The current balance in the blocked account is \$27,133.91. Account activity printout and statement attached.

Attorney
AttorneyMarshall, Jared C (Petitioner, former attorney for Co-Conservators)
Boyajian, Thomas (for Cynthia Thomas & Pamela Thomas – Co-Conservators/Objectors)
Petition - Attorney Fees and Costs for all Services Rendered

		JARED C. MARSHALL , former attorney for Cynthia Thomas & Pamela Thomas, Co-Conservators, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		CYNTHIA THOMAS and PAMELA THOMAS , were appointed Co-Conservators of the Person and Estate on 01/29/14.	
Cont. from 070815		Petitioner requests fees in connection with the representation of the Co-Conservators for their petition to appoint a conservator and subsequent representation of Co-Conservators in various matters concerning the conservatorship.	CONTINUED FROM 07/08/15 Minute Order from 07/08/15 states: The Co-Conservators state their objections in open court today. Written objections are to be filed and properly served by 07/29/15, or the Court may not consider them. Any reply by Mr. Marshall is due by 08/05/15. Note: First Account Current and Report of Co-Conservators was continued to 08/31/15. Co-Conservators are now representing themselves in pro per.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice	<p>The estate consists of approximately \$40,000.00 of personal property and annual income of \$45,000.00. The real property asset that conservatee had an interest in, but no equity in, was lost to foreclosure. The only major paperwork done in this case was for routine services and did not require any extraordinary skills or judgment (preparation of the petitions for temporary and general conservatorship) and required only 1 court appearance each. The attorney also went to court seeking court instructions on a foreclosure regarding conservatee's house that had no equity. All three court appearances were routine.</p> <p>Continued on Page 2</p>	

Reviewed by: JF

Reviewed on: 08/06/15

Updates:

Recommendation:

File 7 - Coyle

Conservators' Objection to Attorney's Fees Sought by Previous Attorney (Con't):

The Co-Conservators spent minimal time with Mr. Marshall and his staff, having only had a few phone calls and no office visits. The Conservatee resides with co-conservator Cynthia Thomas and she provides the conservatee with a safe and caring environment. She pays all of conservatee's obligations and deposits all of conservatee's monthly checks to ensure the conservatee of a comfortable present and future. Any unreasonable expenditures can diminish an estate and place the conservatee in dire circumstances. The requested attorney's fees would jeopardize the conservatee's future needs.

Some examples of unreasonable attorney's fees include 3 hours to prepare the temporary conservatorship petition (totaling \$688.00); 3 hours to prepare the permanent conservatorship petition (totaling \$645.00); and an office conference with staff on 01/15/14 with fees of \$365.00.

Response to Co-Conservator's Objection to Petition for Attorney's Fees and Costs for all services rendered filed 08/05/15 states: The conservators paint the proceedings as simple and uncontested, however, while it's true that no formal, written objections were filed, the case required for more time and attention than a typical "uncontested" conservatorship matter because the conservatee's third daughter, Julia Coyle, was residing with conservatee and misappropriating her funds at a rapid rate. Julia did not file a formal objection, but did file a declaration in response and continued to misappropriate assets during the pendency of the proceedings. Additional time was spent assisting the co-conservators in dealing with Julia's continuing conduct and attempting to thwart further attempts by Julia to loot the estate and assisting co-conservators recover assets previously misappropriated.

In addition, a Petition for Instructions regarding a deed in lieu of foreclosure of the conservatee's residence was necessary and Petitioner communicated with and reviewed correspondence from the lender and loan services in connection with the transaction.

Petitioner has not received a copy of the First Account despite having filed a Request for Special Notice. Petitioner and at least one other attorney have reviewed the fees billed to ensure the amounts are reasonable in light of the work performed, the information available to the firm regarding the size of the conservatorship estate, and the firm's customary fees and billing practices. Fees have been reduced and written off where appropriate.

Co-Conservator's misrepresent the tasks performed in connection with the fees requested. Specifically, Co-Conservators mention 3 hours of time spent on preparation of the temporary conservatorship petition (\$688.00 billed on 12/31/13 for 3.2 hours of attorney time), however the billing records actually show that the time was for 1) preparing for attendance at the hearing on the temporary petition (at which Julia was expected to appear and possibly object), 2) attendance at the hearing, 3) discussing the status of the conservatorship estate with the co-conservators, and 4) discussing and analyzing potential methods for recovering conservatee's vehicle and protecting conservatee's bank accounts. The other specifically pointed out examples are similarly over simplified.

The objection does not contain a prayer for relief and does not request that the Court take any specific action upon consideration of the petition and objection thereto.

A \$60.00 error was discovered and should not be charged to the conservatorship estate, reducing the amount requested to \$18,276.02.

Waiver of Accounting and Petition for Final Distribution and for Allowance of Compensation

DOD: 1/21/13		CHERYL MASON , Executor with Full IAEA without bond, is Petitioner. Accounting is waived. I&A: \$241,837.54 POH: \$251,785.77 (cash) Executor (Statutory): Not addressed Attorney (Statutory): \$8,035.72 Distribution pursuant to the decedent's will is to: Cheryl Mason: \$121,875.02 Pamela Carr: \$121,875.03	NEEDS/PROBLEMS/COMMENTS:	
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			
Reviewed by: skc				
Reviewed on: 8/6/15				
Updates:				
Recommendation: SUBMITTED				
File 8 – Mason				

		MOSHANAE HILL , Maternal Aunt and Guardian, was authorized to fix the minor's residence outside the State of California on 8-4-14.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 7/8/15</u> : Ms. Hill represents that the guardianship in Washington was granted yesterday. The Court orders that Ms. Hill file a declaration with a copy of the WA order appointing attached to it by 8/3/15. Ms. Hill is ordered to be present in court or by Court Call on 8/12/15. As of 8/5/15, nothing further has been filed. 1. Need proof of establishing guardianship or equivalent in Washington pursuant to Probate Code §2352(d).
Cont. from 020415, 052015, 061015, 070815		Order 8-4-14 authorized Guardian to move with the minor to Tukwila, Washington, and required the Guardian to establish guardianship or its equivalent in the State of Washington within four months of the order.	
Aff.Sub.Wit.			
Verified			
Inventory			
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Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: skc
			Reviewed on: 8/5/15
			Updates:
			Recommendation:
			File 9 - Lowe

Status Re: Filing of the Inventory & Appraisal

DOD: 1/18/14		<p>SANDRA BROWN was appointed Executor with Full IAEA without bond on 3/19/15. Letters issued on 3/25/15.</p> <p>At the hearing on 3/19/15, the Court set this status hearing for the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and Appraisal. Probate Code §8800 or written status report per Local Rule 7.5.</p>		
Aff.Sub.Wit.					
Verified					
Inventory					
PTC					
Not.Cred.					
Notice of Hrg					
Aff.Mail					
Aff.Pub.					
Sp.Ntc.					
Pers.Serv.					
Conf. Screen					
Letters					
Duties/Supp					
Objections					
Video Receipt					
CI Report					
9202					
Order					
Aff. Posting					
Status Rpt					
UCCJEA					
Citation					
FTB Notice					
			Reviewed by: skc		
			Reviewed on: 8/6/15		
			Updates:		
			Recommendation:		
			File 11 – Robinson		

DOD: 5/8/14		KAREN LYNN BLUE , Successor Administrator, is Petitioner. Accounting is waived. I&A: \$1,706,074.10 POH: \$60,674.10 plus real property in Fresno, limited partnership shares, two vehicles. Administrator (Statutory): Both Former Administrator and Successor Administrator waived compensation Attorney (Statutory): \$30,060.74 Distribution pursuant to intestate succession and disclaimers: Karen Lynn Blue – Entire estate	NEEDS/PROBLEMS/COMMENTS: 1. Need order. See Local Rules 7.1.1.F, 7.6.1.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: skc
Reviewed on: 8/6/15
Updates:
Recommendation:
File 12 – Blue

Status RE: Filing of the Inventory and Appraisal.

Age:			NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Final I&A filed 7/22/15. Petition for Final Distribution filed 8/3/15 is set for hearing 9/17/15.
DOD:			
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 8/5/15
			Updates:
			Recommendation:
			File 13 – Warrick

14 Nathan Finney, Breanna Finney & Rikki Finney (GUARD/P)**Case No. 15CEPR00122**

Guardian Stone, Tennison Anita (Pro Per – Guardian)

Status Hearing re: Counseling Appointment Information

Nathan, age 16	TENNISON ANITA STONE , step-mother, was appointed guardianship of the person of each of the three minors on 07/01/2015. Letters issued on 07/01/2015. Minute Order of 07/01/2015 set this Status Hearing regarding Counseling Appointment Information. Minute Order states: The Court orders that the minor Nathan is not allowed to go live with any person other than Tennison Stone, and that Ms. Stone is to follow the current restraining order that exists and not allow Rickey Finney within 100 yards of herself or the residence. The Court orders supervised visitation for Desiree Neves, mother, with all three minors every Sunday from 10am-2pm supervised by, and at the home of Alice Urrutia beginning 07/05/2015. Ms. Stone will drop off and pick up the minors for visits. The Court further orders that Ms. Stone obtain a counselor for Breanna forthwith, and provide the date, time and place for said appointment at the hearing on 07/15/2015.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 07/15/2015: The Court orders Ms. Stone to bring paper proof on 08/12/2015 showing that the minor has seen a licensed professional mental health counselor in Fresno.
Breanna, age 14		
Rikki, age 10		
Cont. from 071515		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: LV
Reviewed on: 08/06/2015
Updates:
Recommendation:
File 14 – Finney

		NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Petition withdrawn, hearing 8/12/15 vacated per Minute Order 6/25/15.</p>
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 8/6/15
		Updates:
		Recommendation:
		File 15 - Fuentes

Probate Status Hearing RE: Filing of the Inventory and Appraisal

Age:			NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> I&A Partial No. 1 filed 5/28/15 Final I&A filed 6/26/15
DOD:			
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Reviewed by: skc			
Reviewed on: 8/6/15			
Updates:			
Recommendation:			
File 16 – Tafolla			

17 Burl Donald Kitchen (Estate)**Case No. 15CEPR00319**

Attorney Bagdasarian, Gary G. (for Beverly E. Kitchen – spouse/Petitioner)

Attorney Helon, Marvin T. (for Antoinette Thiel – Objector)

Petition for Probate of Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 10/31/14	BEVERLY E. KITCHEN , surviving spouse, is Petitioner, and requests appointment as Administrator without bond.		NEEDS/PROBLEMS/COMMENTS:
	Full IAEA – OK		
Cont. from 051115, 061715, 072215	Decedent died intestate		CONTINUED FROM 07/22/15
Aff.Sub.Wit.	Residence: Fresno Publication: The Business Journal		
✓ Verified			Minute Order from 07/22/15 states: Counsel represents that they have a tentative agreement and request a continuance. The Court indicates that it will consider signing the order if a stipulation is filed at least two court days before 08/12/15, so that no appearance would be necessary.
Inventory			
PTC			As of 08/06/15, nothing further has been filed.
Not.Cred.			
✓ Notice of Hrg			1. Petitioner requests appointment without bond stating that there are no assets in the estate at this time. All beneficiaries/heirs have not waived bond. The Court may require more information.
✓ Aff.Mail	w/		
✓ Aff.Pub.			Reviewed by: JF
Sp.Ntc.			
Pers.Serv.			Reviewed on: 08/06/15
Conf. Screen			
✓ Letters			Updates:
✓ Duties/Supp			
Objections			Recommendation:
Video Receipt			
CI Report			File 17 - Kitchen
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Estimated Value of the Estate:

\$0.00 - **Petitioner states** that the only assets of the estate are rights of competing heirs as beneficiaries of a life insurance policy and individual retirement account. There are no other assets in the estate at this time.

Probate Referee: RICK SMITH

Opposition and Objection to Petition for Letters of Administration and Petition for Production of Will filed 06/16/15 states: Objector believes the decedent did not die intestate, but executed a will on 07/11/80. Objector is not aware of the will being modified or revoked. Objector believes that Petitioner is aware of the will. The will leaves all of decedent's separate property to Objector. The will nominates Beverly Kitchen as Executor. If Petitioner does not offer decedent's will for probate and seek her appointment as Executor, Objector will, upon production of the will, petition for probate of the will of a lost will, if the will is shown or determined to be lost. Petitioner prays that the Petition be denied and directing Beverly Kitchen to deposit the original will of the decedent. [Copy of will dated 07/11/80 attached].

Response to Opposition and Objection to Petition for Letters of Administration and Petition for Production of Will filed 07/17/15 states: Petitioner has no recollection of executing the documents attached to the opposition and has no knowledge of the whereabouts of any of these documents. The Petitioner also does not know the whereabouts of either of the witnesses to either of the wills (Gloria Helms and Beverly Fielder). Petitioner requests that the Court approve her Petition for Letters of Administration based on the intestacy of Burl Kitchen and appoint her as Administrator of the Estate.

Probate Status Hearing RE: Proof of Bond

DOD: 1/30/15		<p>MICHAEL STRAIT, Son, was appointed Administrator with Full IAEA with bond of \$250,000.00 on 7/8/15.</p> <p>At the hearing on 7/8/15, the court set this status hearing re filing of bond, issuance of letters.</p> <p>As of 8/6/15, bond has not been filed and letters have not issued.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need bond of \$250,000.00 per the Court's order of 7/8/15 or written status report per Local Rule 7.5.</p>
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: skc	
		Reviewed on: 8/6/15	
		Updates:	
		Recommendation:	
		File 18 – Strait	

Petition to Determine Succession to Real Property (Prob. Code §13150)

DOD: 4/8/14		EDWARD ANTHONY GUTHERY is Petitioner. (Relationship not stated.) 40 days since DOD No other proceedings I&A: Not filed Decedent died intestate Petitioner requests ??? (Petition is blank at #13.)	NEEDS/PROBLEMS/COMMENTS: 1. Need amended petition with all information and attachments as required by Probate Code §13150. <u>Note:</u> It appears the decedent was survived by a spouse and issue, who would all be heirs pursuant to Probate Code §6400 et seq. In order to use this summary procedure, all successors in interest must petition together.	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			X
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: skc
Reviewed on: 8/6/15
Updates:
Recommendation:
File 19 – Guthery

Petition for Letters of Administration

DOD: 5/26/15		JOHN DARK , Trustee, is Petitioner and requests appointment of JOHN DARK, Trustee of the Barbara F. Simmons Dark Family Trust , as Administrator with bond set at \$55,000.00 . No IAEA requested. Decedent died intestate. Residence: Fresno Publication: Fresno Business Journal <u>Estimated value of the estate:</u> Real property - \$55,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: 1. There does not appear to be a provision in the Probate Code for a trustee of a trust to be appointed as administrator in their capacity as trustee. 2. Need proof of service on the person or persons having legal custody of Sydney Benlien (minor beneficiary). California Rules of Court, Rule 7.51 (d). <u>Note:</u> If the petition is granted, status hearings will be set as follows: <ul style="list-style-type: none"> Wednesday, September 30, 2015 at 9:00 a.m. in Department 303, for the filing of the bond. Wednesday, January 27, 2016 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, October 26, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: KT		
		Reviewed on: 8/6/15		
		Updates:		
		Recommendation:		
		File 20 – Benlien		

Petition for Letters of Special Administration

DOD: 6/26/13		THERESA FINGER , Daughter, is Petitioner and requests appointment as Special Administrator without bond.	NEEDS/PROBLEMS/COMMENTS:
		All heirs waive bond and notice of hearing.	1. DE-142 Waiver of Bond by Heir or Beneficiary was adopted as a mandatory Judicial Council form on 1/1/15. The waivers signed by the five heirs are not on the mandatory form.
	Aff.Sub.Wit.		
✓	Verified	Petitioner requests specific authority to file a Petition to Determine Succession on this estate's behalf in the Matter of Richard Galvan, this decedent's predeceased spouse.	2. Petitioner does not provide the date of death of the decedent's deceased spouse pursuant to Local Rule 7.1.1.D.
	Inventory		
	PTC		Note: Court records in related case 15CEPR00655 indicate that this decedent's spouse Richard Aguilar died 3/26/07; however, this information is not stated in this petition. Need verification.
	Not.Cred.		
N/A	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 8/5/15
			Updates:
			Recommendation:
			File 21 – Aguilar

DOD: 04/17/15		ANITA LEAL-IDROGO, daughter/named alternate Executor without bond, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:	
				Note: The court may require bond if the proposed personal representative resides outside California or for other good cause, even if the will waives bond, pursuant to California Rules of Court 7.201(b) and Probate Code 8571.	
		Petitioner is a resident of North Carolina.		Note: If the petition is granted status hearings will be set as follows:	
Cont. from				<ul style="list-style-type: none"> • Wednesday, 09/16/15 at 9:00am in Dept. 303 for filing of the bond (if required) • Wednesday, 01/13/16 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Wednesday, 10/12/16 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. 	
	Aff.Sub.Wit.	s/p			
✓	Verified		Full IAEA – OK		
	Inventory		Will dated 01/30/13		
	PTC		Residence: Fresno		
	Not.Cred.		Publication: The Business Journal		
✓	Notice of Hrg		Estimated Value of the Estate:		
✓	Aff.Mail	w/	Personal property - \$1,525,000.00		
✓	Aff.Pub.		Annual income - 20,000.00		
	Sp.Ntc.		Real property - 350,000.00		
	Pers.Serv.		Total - \$1,895,000.00		
	Conf. Screen		Probate Referee: RICK SMITH		
✓	Letters		Petitioner states that the decedent was subject to a conservatorship of her person and estate at the time of her death. The conservator of the Estate, Bruce Bickel, currently has control over all known assets of the decedent. Until such time as Mr. Bickel has filed his Petition to approve a final accounting and for distribution of the conservatorship estate, it is anticipated that there will be no assets in the probate estate. Therefore bond is not necessary at this time.	Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.	
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting			Reviewed by: JF	
	Status Rpt			Reviewed on: 08/06/15	
	UCCJEA			Updates:	
	Citation			Recommendation:	
	FTB Notice			File 22 – Haney	